## **Creating the Data Source for HEAT**

- From the Start Menu, select Settings\Control Panel
- On the Control Panel select Administrative Tools\Data Sources (ODBC).
- You should then see a window like this



- Click the System DSN tab along the top (2<sup>nd</sup> from left).
- If you have a prior HEAT data source, highlight and click remove.
- Click the Add button on the right.
- From the Create New Data Source window, highlight SQL Server in the list.
- Click the Finish button along the bottom. You will see a screen that looks like this: The input boxes will be blank. The information to enter is specified on the next page.

Microsoft SQL Server DS	N Configuration	×
Selacit a driver ror me of Access of Access of Excel brocedit FoxPri of all about cosoft FoxPri cosoft PoxPri Cosoft PoxPri Coso	This wizard will help you create an ODBC data source that you can use connect to SQL Server. What name do you want to use to refer to the data source? Name: HEAT How do you want to describe the data source? Description: HEAT Which SQL Server do you want to connect to? Server: HeatDB.EduTech.org\adminapps	
	Finish <u>N</u> ext > Cancel Help	

- Enter the following information: Name: HEAT Description: HEAT Server Name: HeatDB.Edutech.org\adminapps
- Click Next

Microsoft SQL Server DSN Configuration		
Selaci a dirver to me off 400 asset off 400	How should SQL Server verify the authenticity of the login ID?         ○ With Windows NT authentication using the network login ID.         ○ With SQL Server authentication using a login ID and password entered by the user.         To change the network library used to communicate with SQL Server, click Client Configuration.         Client Configuration         Connect to SQL Server to obtain default settings for the additional configuration options.         Login ID:         heat         Password:	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	

- Make sure that the radio button next to With SQL Server authentication is checked. Then, check the box next to Connect to SQL Server to obtain default settings... type in Login ID of heat and password of heat4257. Then uncheck the box.
- Next, Click on the Client Configuration Button, Server alias should be the name of the server, Network Libraries should be TCP/IP, and the Connection Parameters should fill in automatically when you select TCP/IP. Click Ok, then next.

Edit Network Library Configuration		×
🧕 Server <u>a</u> lias:	HeatDB.Edutech.org\adminapps	
Network libraries ○ Named Pipes ④ ICP/IP ○ Multiprotocol ○ NWLink IPX/SPX ○ AppleTalk ○ Banyan ⊻INES ○ V/A	Connection parameters         Server name:       HeatDB.Edutech.org\adminapps         Image: Dynamically determine port         Port number:	
C <u>O</u> ther	OK Cancel Help	

• On the next screen, uncheck all the boxes and click next.

Microsoft SQL Serv	er DSN Configuration	×
Select a divier ror me oit dBase T oit dB	Change the default database to: [Default] Attach database filename: Create temporary stored procedures for prepared SQL statements and drop the stored procedures: Ourly when you disconnect. When you disconnect and as appropriate while you are connected.	
	Use ANSI rulls, paddings and warnings.	
	Use the failover SQL Server if the primary SQL Server is not available.	
	< <u>B</u> ack <u>N</u> ext > Cancel Help	

• Again, uncheck all the boxes and click finish

Microsoft SQL Server	r DSN Configuration
Selacit a driver row me off Access off Access off Access off Base off Base off ODB osoit Pare Selacit Second Microsoft For Selacit Second Second Tex Selacit Second Microsoft For Second Tex Selacit Second Second Tex Second Tex Secon	Change the language of SQL Server system messages to:         (Default)         Use strong encryption for data         Perform translation for character data         Use regional settings when outputting currency, numbers, dates and times.         Save long running queries to the log file:         C:\DOCUME~1\RDICKE~1\LOCALS~1\Temp\QU         Browse         Long query time (milliseconds):         30000         Log QDBC driver statistics to the log file:         C:\DOCUME~1\RDICKE~1\LOCALS~1\Temp\ST         Browse
	< <u>B</u> ack Finish Cancel Help

• The next screen confirms your choices.

ODBC Microsoft SQL Server Setup	X
A new ODBC data source will be created with the following configuration:	
Microsoft SQL Server ODBC Driver Version 03.85.1132	<u> </u>
Data Source Name: HEAT Data Source Description: HEAT Server: HeatDB.Edutech.org\adminapps Database: (Default) Language: (Default) Translate Character Data: No Log Long Running Queries: No Log Driver Statistics: No Use Integrated Security: No Use Regional Settings: No Prepared Statements Option: Do not create temporary procedures Use Failover Server: No Use ANSI Quoted Identifiers: No Use ANSI Quoted Identifiers: No Use ANSI Null, Paddings and Warnings: No Data Encryption: No	
	<b>T</b>
Test Data Source OK Cance	;I

- Click OK
- You should see your new data source.

🕙 ODBC Data Source	Administrator	<u>? ×</u>
User DSN System DS	N File DSN Drivers Tracing Connect	ion Pooling About
System Data Sources:		
Name	Driver	A <u>d</u> d
ECDCMusic HEAT	Microsoft Access Driver (*.mdb) SQL Server	Remove
ManCon Metric Log saa	Microsoft Access Driver (*.mdb) SQL Server	<u>C</u> onfigure
1		
An ODBC System data source stores information about how to connect to the indicated data provider. A System data source is visible to all users on this machine, including NT services.		
	OK Cancel App	aly Help

- In the ODBC Data Source Administrator window, click OK.
- Close Control Panel

HEAT data source set-up is now complete!

## **HEAT 9.0.2 Workstation Setup**

- You will need to close out of any <u>applications</u> you have open on your screen before you begin.
- You do not need to uninstall the prior version of HEAT, the new install will update the old version.
- From the Start Button, select Run
- From the Run box, click the Browse button
- Click My Network Places, then double click Entire Network.
- Next double click Netware Services, Netware Servers.
- Now double click Edu-Adm, then the folder Vol1, then Apps, then HEAT Client, then Setup
- Highlight HEAT.EXE and click the Open button (or double click HEAT.EXE)
- You will be back at the Run box with the file HEAT.EXE ready to open.
- Click OK. The workstation setup will begin.

## If you receive a NET 3.5 error:

- From the Start Button, select Run
- From the Run box, click the Browse button
- Click My Network Places, then double click Entire Network.
- Next double click Netware Services, Netware Servers.
- Now double click Edu-Adm, then the folder Vol1, then Apps, then HEAT Client, then NET 3.5
- Highlight dotnetfx35setup.exe and click the Open button (or double click dotnetfx35setup.exe)
- Click OK
- Accept the User Agreement by clicking on the radio button and then click the 'Install' button
- Ensure that you see the .NET 3.5 SP1 installed successfully message and then the Next button
- From the Start Button, select Run
- From the Run box, click the Browse button
- Now double click Setup
- Highlight HEAT.EXE and click the Open button (or double click HEAT.EXE)
- You will be back at the Run box with the file HEAT.EXE ready to open.
- Click OK. The workstation setup will begin.

- When asked to update the previous version, click yes
- On the HEAT Installation Welcome window, click Next. If you receive a message about having to have IIS 5.0 or higher, click ignore.
- Click the box to accept the license agreement and both boxes below, then click next.
- On the Setup window, click Next.
- On the Ready to Install window, click install.
- You will see a status bar on the installing HEAT window during the install.
- When it is complete, you will see an "Installation Wizard Completed", click Finish.
- Click Yes to restart your computer.
- To create a new icon for HEAT on your desktop, right click on the background of your desktop.
  - \* From the pop-up box, choose new, then Shortcut.
  - \* Click the Browse button under the command line box.
  - \* In My Documents, double click on the C:\ folder, then Program Files folder, then the HEAT folder.
  - \* Highlight "Call Log" and click OK.
  - \* Information pointing to Call Log should appear in your Command Line box. Click Next.
  - \* Select a name for the shortcut. It will default to "CallLog" but you can change the name.
  - \* Click Finish. You should now see a new shortcut on your desktop for HEAT.

## **Starting HEAT 9.0.2 for the first time**

- Now you are ready to go into call logging.
- When click on you new HEAT icon, you will be asked to select a data source

HEAT Service & Support Data Source	×
Please specify the Data Source to use with HEAT	
HEAT	-
✓ Automatically use this Data Source in the future.	
OK C	ancel

- Select HEAT and make sure Automatically use this Data Source in the future is checked.
- Click OK
- You will then see a SQL Server Login Box (This will be a one-time set-up)

SQL Server Lo	gin	×
Data Source:	HEAT	ОК
Use Trusted Connection		Cancel
Login ID:	heat	<u>H</u> elp
Password:	••••	Options >>

- Type in the Login ID and Password and click OK Login ID = heat Password = heat4257
- Click yes on Automatically use database User ID and Password in the future.



• Next, the HEAT Login screen will appear.



- Login in with your User ID and Password and click OK.
- You are now logged into the NEW HEAT 9.0.2 !!!!!!
- With HEAT 9.0.2, the Dashboard automatically starts when you log into HEAT. You can click the "X" in the right hand corner to close. If you do not want it to start every time, go to the Edit menu and select user preferences. At the very bottom of the Display tab, uncheck the Show Dashboard At Startup box.
- If the HEAT Ticket number is not displayed:
- Click on the HEAT 'View' pull down menu and check the 'Call Status Banner'



If you have any problems, please call Rhonda Dickenson at Ext. 7438 or Kirk Simpson at Ext. 7300.